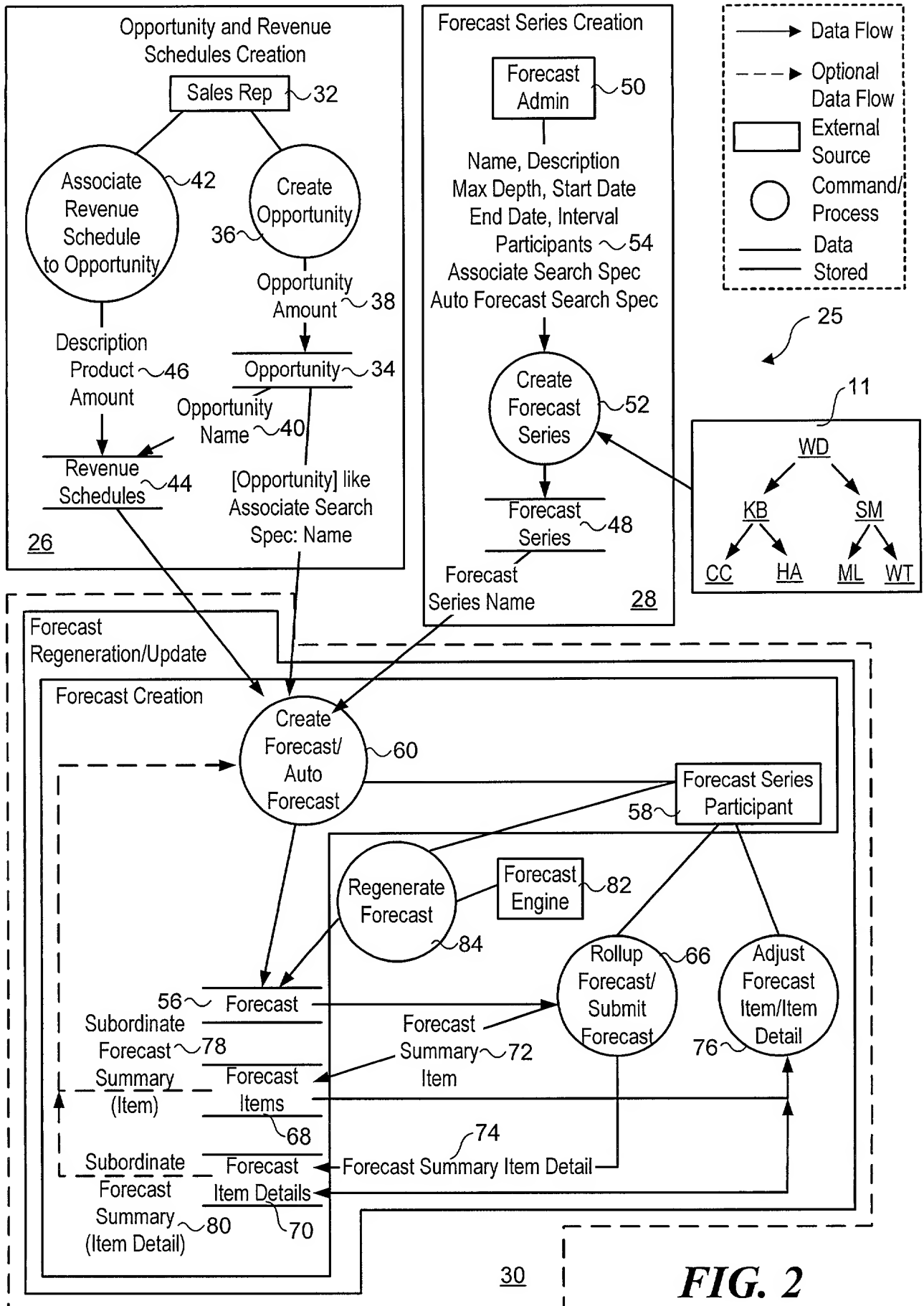


**FIG. 1**



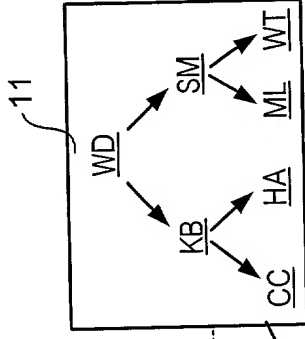
**FIG. 2**

Creating Forecast Series

Forecast Admin 50

Name, Description, Start Date, End Date, Max Depth, Interval, Interval Period, View Mode  
Base Period Type, Participants, Associate Search Spec, Auto Forecast Search Spec, 54

Create Forecast Series 52



86T

S\_FCSTSER

Name	Start	End	Assoc. Search Spec	Auto Search Spec	View Mode
Series 1	1/1/00	12/1/00	[Opportunity] like 'Oppty Name_1'	[Opportunity] like 'Oppty Name_1'	Sales Rep
Series 2	1/1/00	1/31/00	[Opportunity] like 'Oppty Name_2'	[Opportunity] like 'Oppty Name_2'	Manager

FIG. 3

Forecast Series									
102	104		106		108		110	112	114
	Description		Frequency		Auto Fcst Filter				
	Oppty Forecast		Month		[Revenue_Type] = "Booked" and ...				
	Product Forecast		Month		[Revenue_Type] = "Billed" and ...				
Named Acts		Quarterly	Fcst	Quarter	[Date] >= Fcst_Start_Dt and <= ...				
Manual Add Filter									
[Revenue_Type] = ...									
[Date] >+ Fcst_Start_Dt ...									
Active									
√									
Mode									
All									
All Across Org's									
Sales Rep									
√									

FIG. 4

Forecast Series Dates				
118	120		122	Description
	Start Period			
	Jan 99			
	Feb 99			
Date	1/1/99		End Period	
	2/1/99		December 99	
			January 00	
			Edit Period	

FIG. 5

### Forecast Participants

Last Name	First Name	Position	Region	Position Type	Division	Department	Rolls Up To
Conway	Chris	Call Center Rep, NY	Western	Outbound Rep	Telesales	Telesales	Walter Davis
Alacon	Hector	Field Sales Rep, NJ	Eastern	Field Sales Rep	Field Sales	Telesales	Kim Beale

**FIG. 6A**

### Add Forecast Participants

Last Name	First Name	Position	Region	Position Type	Division	Department	Parent Pos	Manager
Conway	Chris	Call Center Rep, NY	Western	Outbound Rep	Telesales	Telesales	Mgr, Tele	Walter Davis
Alacon	Hector	Field Sales Rep, NJ	Eastern	Field Sales Rep	Field Sales	Telesales	Mgr, Field	Kim Beale

Add

New

Close

**FIG. 6B**

S\_FCSTSER

86T

Series	Start Date	End Date	Base Period	Interval	Interval Period Type
Series 1	1/1/2000	12/1/2000	Month	7	Day

S\_FCSTSER\_DATE (from Forecast Series Date View

148T

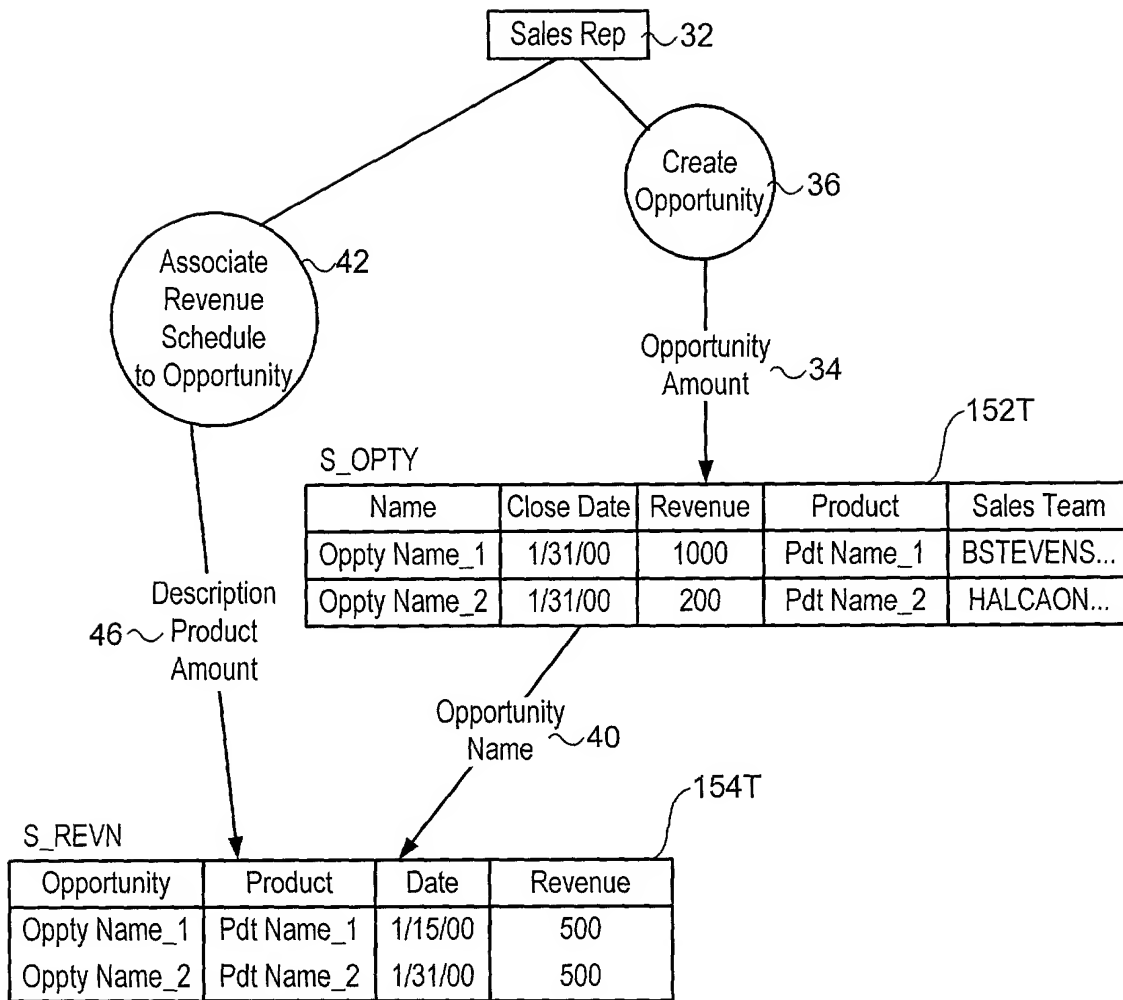
Forecast Date	Start Date	End Date	History View Date	History Edit Date
1/1/2000	1/1/2000	1/31/2000	11/1/99	12/1/99
1/8/2000	1/1/2000	1/31/2000	11/1/99	12/1/99
1/15/2000	1/1/2000	1/31/2000	11/1/99	12/1/99
1/22/2000	1/1/2000	1/31/2000	11/1/99	12/1/99
1/29/2000	1/1/2000	1/31/2000	11/1/99	12/1/99
2/5/2000	2/1/2000	1/29/2000	11/1/99	12/1/99

S\_FCSTSER\_POSTN (from Forecast Series Participants View)

150IT

Last Name	First Name	Position	Parent Position
Stevens	William	Sales Rep	Manager-West
Conway	Chris	Manager-West	Manager-US
Alacon	Hector	Manager-US	Vice President

**FIG. 7**



**FIG. 8**

FIG. 9 is a diagram illustrating a data flow for creating an auto forecast. The process starts with a user (150T) interacting with a system (156T) to create a forecast (60). The system then generates a forecast series (58) based on the user's input. The forecast series is then used to create a forecast (60) which is then used to generate a forecast series (58).

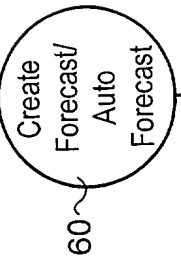
S\_FCSTSER\_POSTN

Last Name	First Name	Position	Parent Position
Stevens	William	Sales Rep	Manager-West

150T

Forecast Series Participant

58



60

86T

S_FCSTSER		Auto Search Spec		View Mode
Name	Start	End	Assoc. Search Spec	
Series 1	1/1/00	12/1/00	[Opportunity] like 'Oppty Name_1'	Sales Rep
Series 2	1/1/00	1/31/00	[Opportunity] like 'Oppty Name_2'	Manager

S\_FCST

Series	Date
Series 1	Oppty Name-1

156T

S\_REVN

Opportunity	Product	Date	Revenue
Oppty Name_1	Pdt Name_1	1/15/00	500
Oppty Name_2	Pdt Name_2	1/31/00	500

154T

S\_FCST\_ITEM

Date	Product	Opportunity
1/15/00	Pdt Name_1	Oppty Name_1
1/31/00	Pdt Name_2	Oppty Name_2

160T

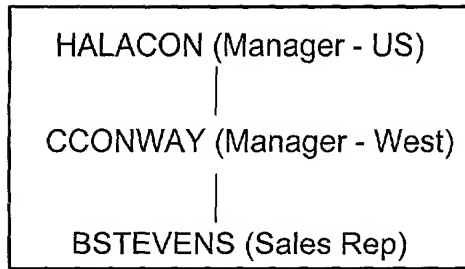
S\_FCST\_ITEM\_DTL

Date	Revenue
1/15/00	500
1/31/00	500

162T

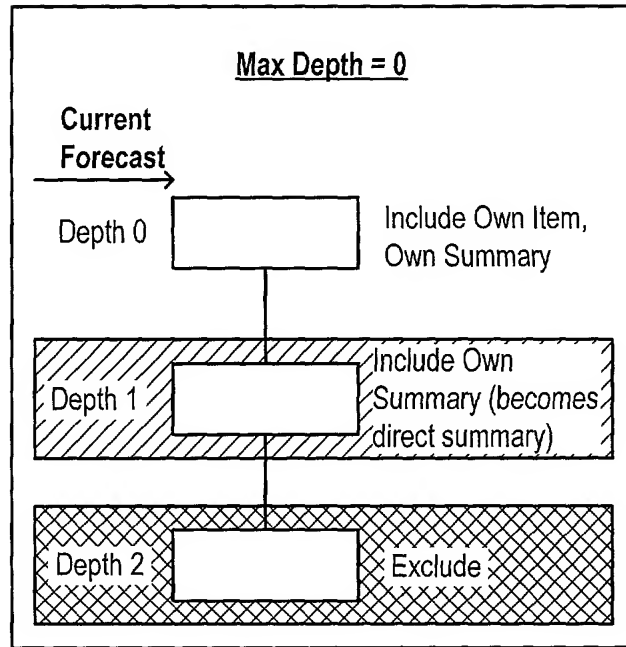
FIG. 9



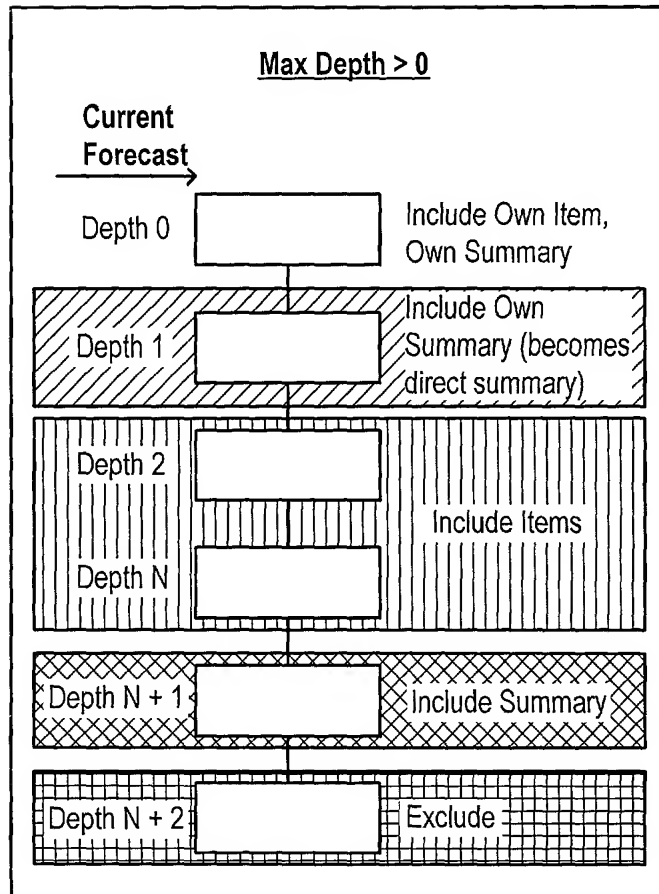


ORGANIZATION  
HIERARCHY

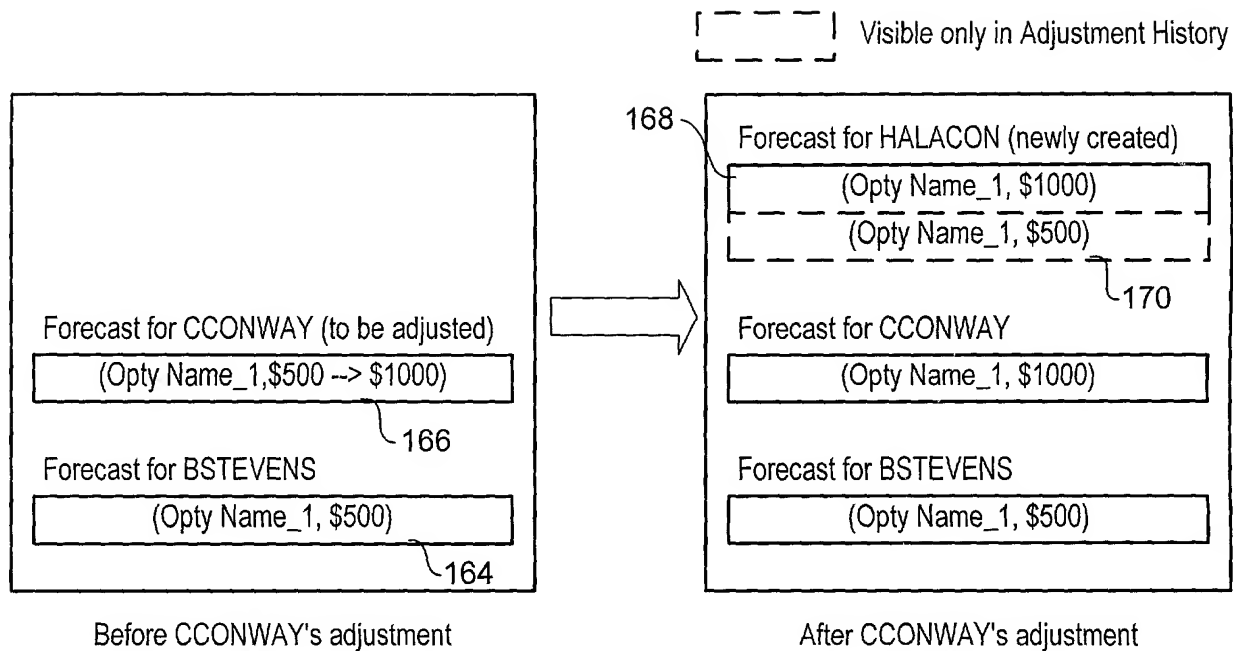
**FIG. 10**



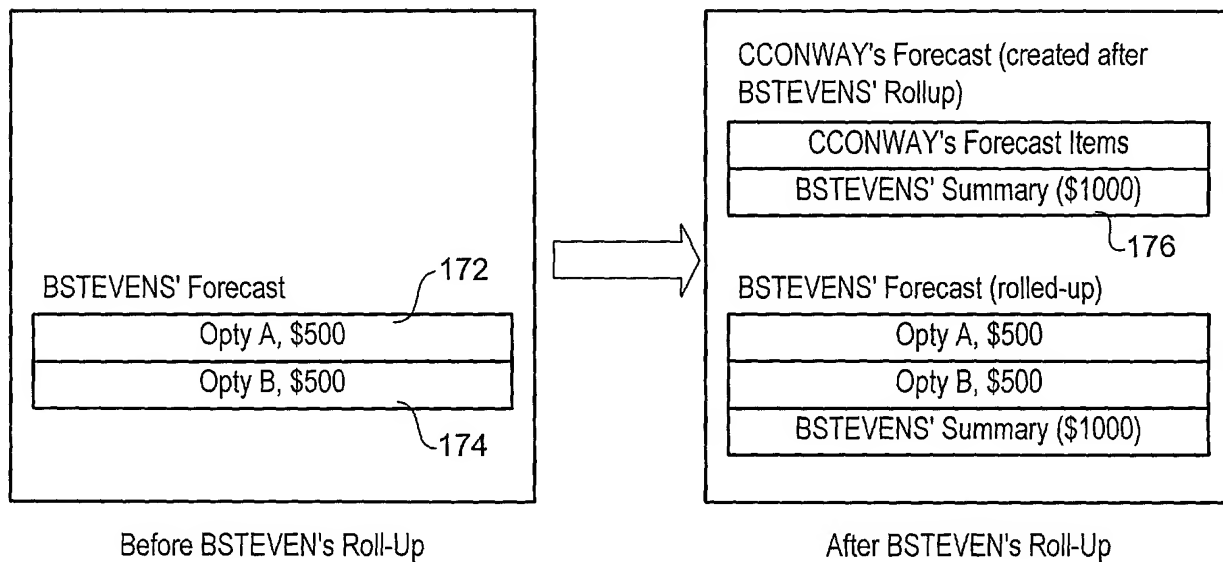
**FIG. 11A**



**FIG. 11B**

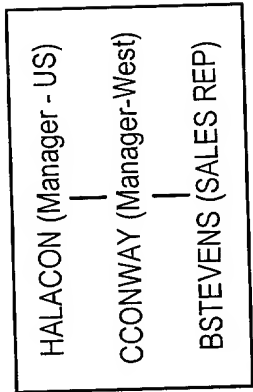


**FIG. 12**



**FIG. 13**

FIG. 14 is a diagram illustrating the organization hierarchy and forecast regeneration process. The diagram shows the relationship between HALACON (Manager - US), CCONWAY (Manager-West), and BSTEVENS (SALES REP). It also shows the forecast items and summaries for each entity, including the regeneration process for HALACON's forecast items and summaries.



Organization Hierarchy

[ - - - ] Deleted

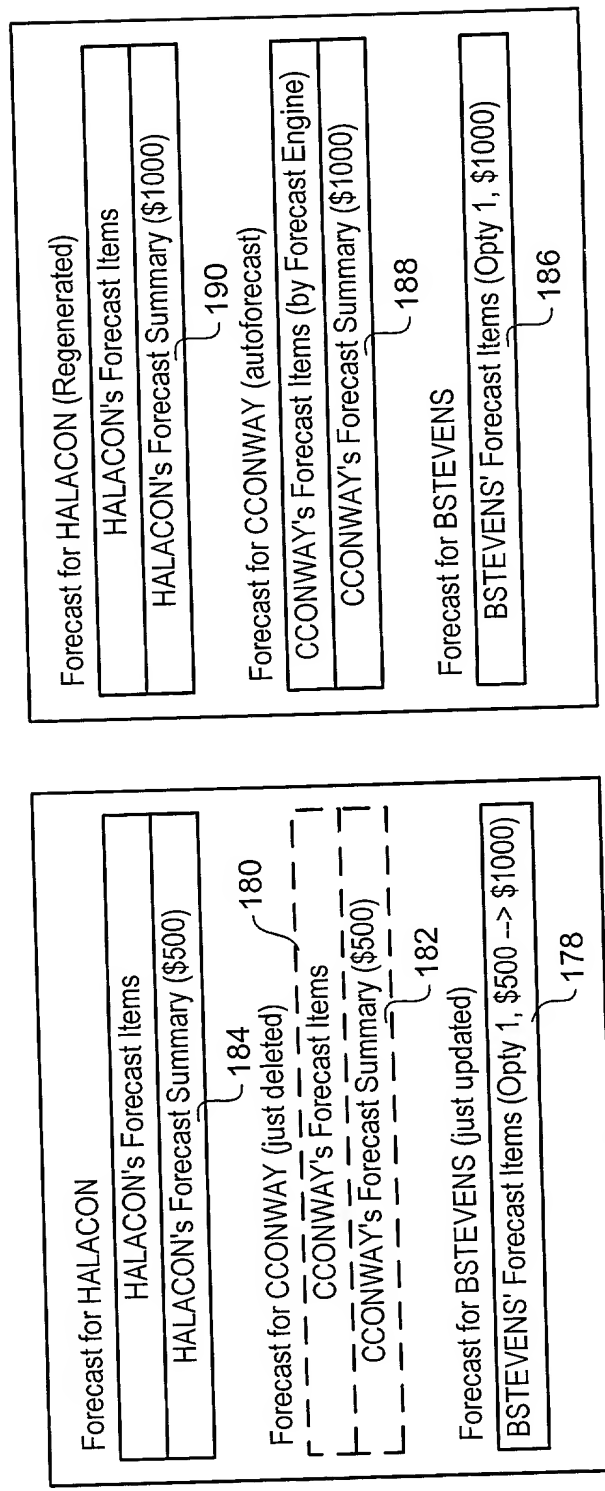
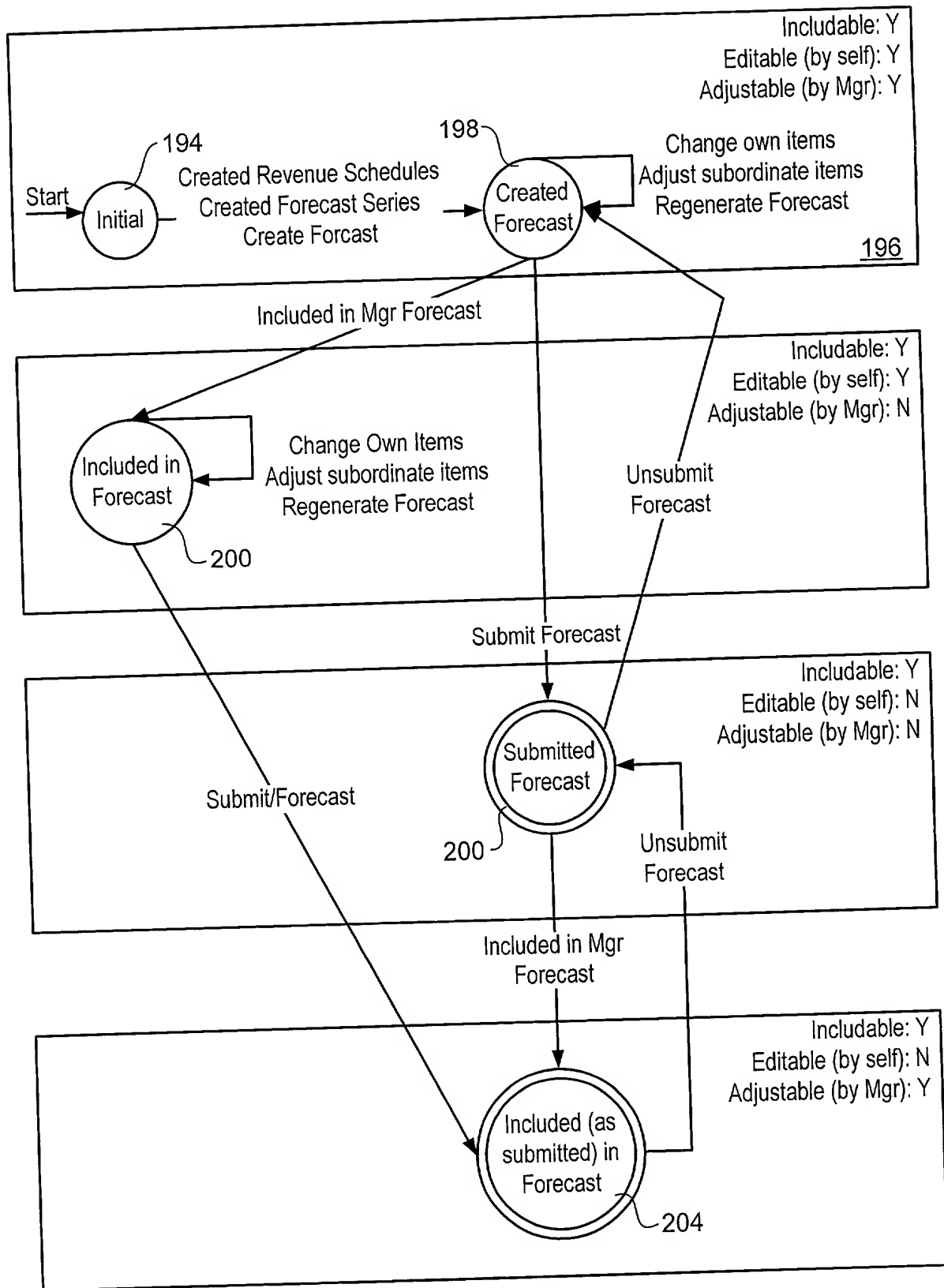


FIG. 14



**FIG. 15**

212

Account		A.K. Parker Inc., HQ		Opportunity		275 Portables at A.K. Parker		Committed		232 234	
Address		101 Main Street San Mateo, CA 94402 USA		Description		Great opportunity for our ...		Revenue		222 \$850,000	
Source		ABC TV Ad		Lead Quality		High		Upside		224 \$125,000	
		218		Methodology		Strategic Selling		Close Date		238 04/01/99	
		218		Sales Stage		03 - Qualification		Probability		240 50%	
		218									

Opportunity Revenues		242		244		248		250		252		254		256		258		260	
Summary	Date	Descr	Product	Qty	Price	Revenue	Upside	Downside	Rev Class	Rev Type	Prob	Sales Rep							
✓	1/1/99		1 GB Drive	10	\$250	\$2500			Closed		50%	HALACON							
	2/1/99		1 GB Drive	50	\$200	\$10000			Commit		50%	CCONWA							
	3/1/99		-	-	-	\$50,000	\$40,000		Expected	Bookings	60%	HALACON							
	4/1/99	Install	-	-	-	\$1800					70%	HALACON							
✓	5/1/99	Services	-	-	-	\$50,000	\$25,000	\$30,000	Upside	Billings	60%	CCONWA							
	6/1/99		T1 Rental	5	\$10	\$3000					60%	CCONWA							
	6/1/99		T1 Rental	5	\$15	\$4500					70%	HALACON							
Totals				100		\$140,000	\$65,000	\$30,000											

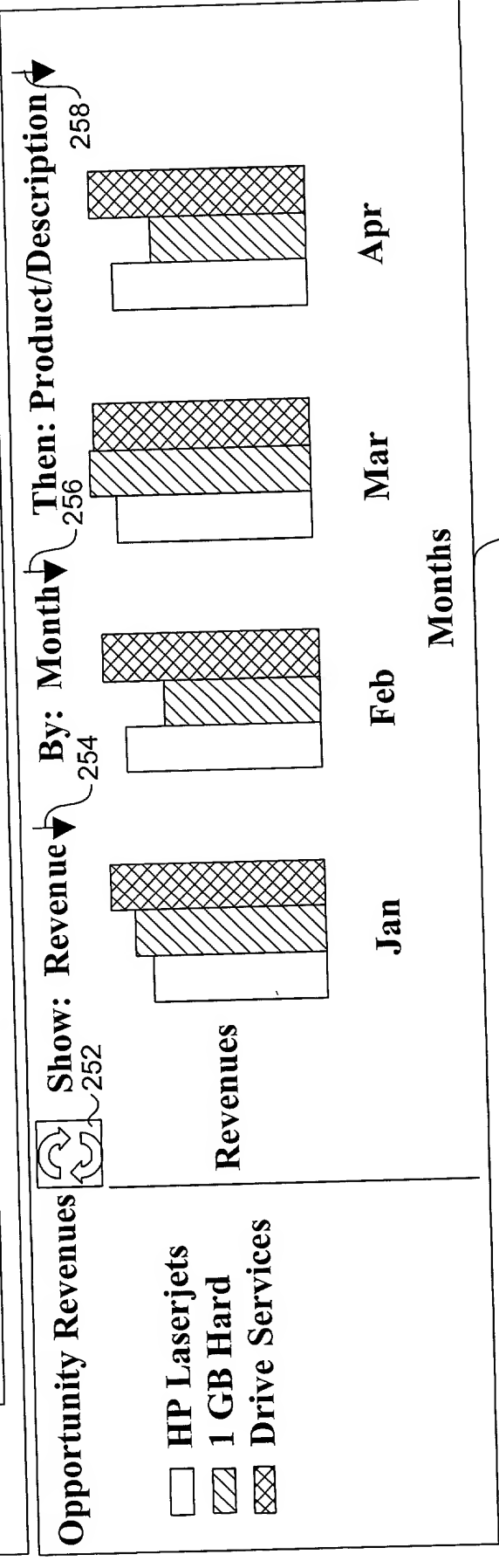
214

210

FIG. 16

212

<b>Account</b>	A.K. Parker Inc., HQ	<b>Opportunity</b>	275 Portables at A.K. Parker	<b>Committed</b>	<input type="checkbox"/>
<b>Address</b>	101 Main Street San Mateo, CA 94402 USA	<b>Description</b>	Great opportunity for our ...	<b>Revenue</b>	\$850,000
<b>Source</b>	ABC TV Ad	<b>Lead Quality</b>	High	<b>Upside</b>	\$125,000
		<b>Methodology</b>	Strategic Selling	<b>Close Date</b>	04/01/99
		<b>Sales Stage</b>	03 - Qualification	<b>Probability</b>	50%



214A

210

FIG. 17

### Revenue Schedule Wizard – Step 1 of 4 – Date Range

Start Date: 1/1/99 ▼ 264  
End Date: 12/31/99 ▼ 266  
Frequency: Month ▼ 268  
No. of Periods: 12 ▼ 270

☒ Replace the existing revenue schedule items

272

Cancel

< Back

Next >

Finish

262

**FIG. 18A**

274

### Revenue Schedule Wizard – Step 2 of 4 – Default Values

Account: A.K. Parker Inc. ▼ 278  
Opportunity: 275 Portables ▼ 280  
Contact: ▼ 282  
Product: 1 GB Hard Drives ▼ 284  
Product Line: Hardware ▼ 286  
Revenue Class: Upside ▼ 288  
Revenue Type: Telecommunications ▼ 290

Cancel

< Back

Next >

Finish



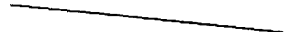



276

**FIG. 18B**

292

### Revenue Schedule Wizard – Step 3 of 4 - Patterns

Patterns: 296 ~ Quantity 298 ~ Price 300 ~ Revenue

Straight Line  302	Increasing 10%  304	Decreasing 5% 314 (TYP)  306
Marginal Returns -10%  308	Exponential 10%  310	Stepped -10%  312

Select the appropriate revenue schedule patterns for Quantity, Price, and Revenue

Cancel

<Back

Next >

Finish

FIG. 18C

### Revenue Schedule Wizard – Step 4 of 4 – Amounts

Starting Quantity:

Starting Price:

Starting Revenue:

Average Price:

Total Quantity:

Total Revenue:

\$250

3000

\$600,000

Cancel

<Back

Next >

Finish

FIG. 18D



FIG. 19 is a schematic diagram of a system for generating a revenue analysis report. The system includes a database 328, a processor 330, and a user interface 332. The database 328 stores data for various accounts, including Acme, AK Parker, and AG Edwards. The processor 330 generates a revenue analysis report based on the data stored in the database 328. The user interface 332 displays the report to the user.

328

# Revenues

Flag Summary Date	Commit	Account	Opportunity	Description	Revenue	Rev Class	Prob	Sales Rep
✓ 1/1/99		AK Park	275 Portables	Services	\$50,000	Bookings	50%	HALACON
✓ 1/1/99	✓	AK Park	275 Portables	Hardware	\$65,000	Bookings	60%	HALACON
✓ 1/1/99		AK Park	275 Portables	Networks	\$25,000		60%	HALACON
✓ 1/1/99		AK Park	275 Portables	Services	\$35,000	Billings	50%	HALACON
✓ 1/15/99	✓	Acme	Routers + Hub	Networks	\$65,000	Bookings	60%	HALACON
✓ 1/15/99	✓	Acme	Routers + Hub	Install	\$90,000	Bookings	50%	HALACON
✓ 1/15/99		Acme	Routers + Hub	Rollout	\$65,000		50%	HALACON

## Revenue Analysis



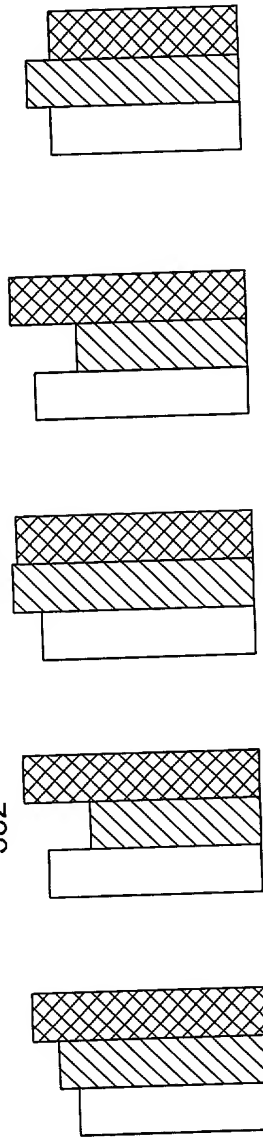
Show: Revenues

By: Month

Then: Account

- Acme
- AK Parker
- AG Edwards

Revenues



May

Apr

Mar

Feb

Jan

Months

326

330

FIG. 19

410

**Forecasts**

Series	Fest Date	Status	Forecaster	Created By	Create Date	Submitted By	Submit Date	Revenue Amt
Billings	02/01/99	In Process	KBEALE	KBEALE	02/01/99	SADMIN	1/1/99	\$1,000,000
Billings	01/01/99	In Process	KBEALE	SADMIN	01/01/99	SADMIN	1/1/99	\$1,300,000
Bookings	01/01/99	In Process	KBEALE	SADMIN	01/01/99	CCONWAY	12/01/98	\$1,200,000
Billings	12/01/98	Submitted	CCONWAY	CCONWAY	12/01/98	CCONWAY	12/01/98	\$1,700,000
Bookings	12/01/98	Submitted	CCONWAY	CCONWAY	12/01/98	CCONWAY	12/01/98	\$1,500,000

<b>Series</b>	Billings	214	▼	<b>Forecaster</b>	KBEALE	418	<b>Create Date</b>	02/01/99	430	▼
<b>Forecast Date</b>	02/01/99	216	▼	<b>Division</b>	Sales	424	<b>Created By</b>	SADMIN	432	
<b>Status</b>	Active	220	▼	<b>Position</b>	NE Sales Rep3	426	<b>Submit Date</b>	02/01/99	434	▼
<b>Revenue Amt</b>	\$1,200,000	222	▼	<b>Position Type</b>	Field Sales	428	<b>Submitted By</b>	SADMIN	436	

408

212

**FIG. 20**

438

Series	Billings	214	▼	Forecast	KBEALE	Create Date	02/01/99	430	▼
Forecast Date	02/01/99	216	▼	Division	Sales	Created By	SADMIN	432	▼
Status	Active	220	▼	Position	NE Sales Rep3	Submit Date	02/01/99	434	▼
Revenue Amt	\$1,200,000	422	▼	Position Type	Field Sales	Submitted By	SADMIN	436	▼

Show:

▼

442

GO



## Forecast Line Items

Date	Fest	Cmt	Account	Opportunity	Description	Revenue	Upside	Downside	Margin	Prob
1/1/99	✓		AK Parker	275 Portables	Services	\$50,000	\$30,000			50%
1/1/99		✓	AK Parker	275 Portables	Hardware	\$65,000		\$40,000	\$30,000	60%
1/1/99	✓		AK Parker	275 Portables	Networks	\$25,000				50%
1/1/99			AK Parker	275 Portables	Services	\$35,000				50%
1/15/99	✓		Acme	Routers + Hub	Networks	\$65,000	\$45,000			60%
3/15/99	✓	✓	Acme	Routers + Hub	Install	\$90,000		\$15,000	\$45,000	75%
1/15/99	✓		Acme	Routers + Hub	Rollout	\$65,000			\$15,000	75%

440

FIG. 21

438

Series	Billings	214 ▼	Forecast	KBEALE	Create Date	02/01/99	430 ▼
Forecast Date	02/01/99	216 ▼	Division	Sales	Created By	SADMIN	432
Status	Active	220 ▼	Position	NE Sales Rep3	Submit Date	02/01/99	434 ▼
Revenue Amt	\$1,200,000	422	Position Type	Field Sales	Submitted By	SADMIN	436



Forecast Summary

Show: Revenues

By: Month

Then: Account

Refresh

- Acme
- AK Parker
- AG Edwards

Revenues

Jan

Feb

Mar

Apr

May

Months

437

444

FIG. 22

## Forecasts

Series	Fcst Date	Status	Forecaster	Created By	Create Date	Submitted By	Submit Date
Billings	02/01/99	In Process	KBEALE	KBEALE	02/01/99	KBEALE	1/1/99
Billings	01/01/99	In Process	KBEALE	KBEALE	01/01/99	SADMIN	1/1/98
Billings	12/01/98	In Process	KBEALE	SADMIN	12/01/98		



Forecast Comparison

Show: Revenues

By: Month

456

458

Revenues

- 02/01/99 Billings
- 01/01/99 Billings
- 12/01/98 Billings

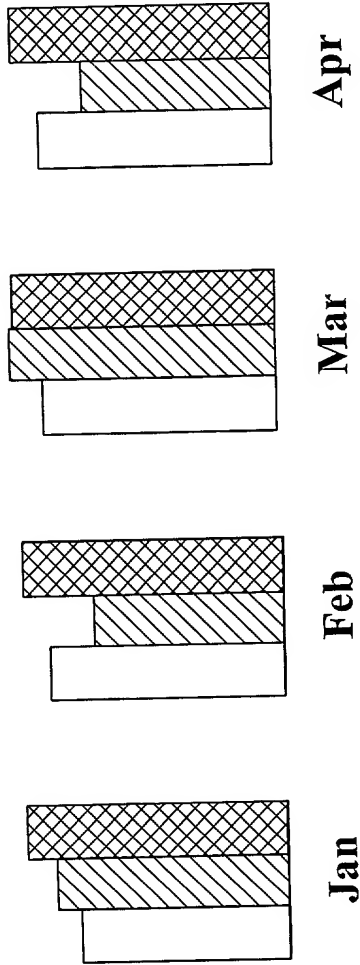


FIG. 23

462

### Employees

- ☒ WDAVIS
- ☐ KBEALE
- ☐ HALACON
- ☐ CCONWAY
- ☐ SMILLER
- ☐ MLEMUR
- ☐ WTAKUDA

464

### Employees

Name	UserID	Position
Walter Davis	WDAVIS	VP of Sales
Kim Beale	KBEALE	Regional Manager, NE
Hector Alacon	HALACON	Field Sales Rep, NJ
Chris Conway	CCONWAY	Field Sales Rep, NY
Susan Miller	SMILLER	Regional Manager, SE
Mark Lemur	MLEMUR	Field Sales Rep, FL
Wayne Takuda	WTAKUDA	Field Sales Rep, GA

### Forecast Summary

Show: Revenues  By: Month  Then: Account 

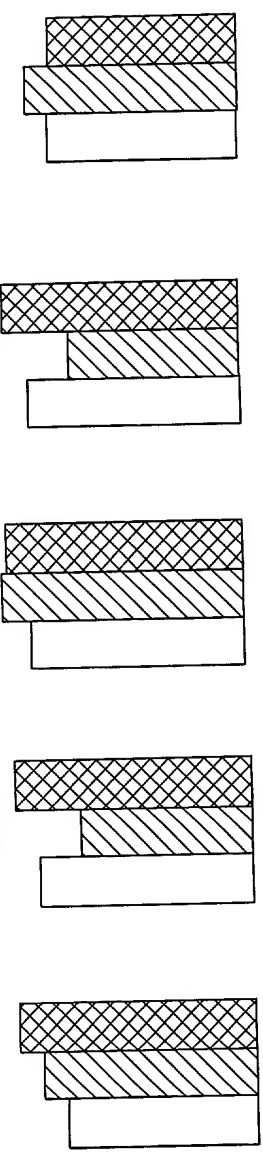
474

Refresh

472

- ☐ Acme
- ☒ AK Parker
- ☒ AG Edwards

### Revenues



Jan Feb Mar Apr May

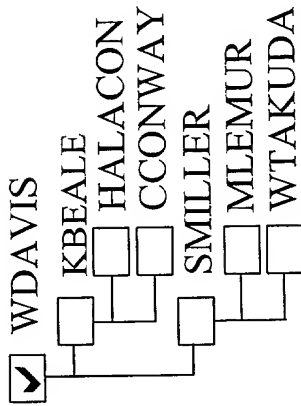
Months

466

460

FIG. 24

## Employees



## Employees

Name	UserID	Position
Walter Davis	WDAVIS	VP of Sales
Kim Beale	KBEALE	Regional Manager, NE
Hector Alacon	HALACON	Field Sales Rep, NJ
Chris Conway	CCONWAY	Field Sales Rep, NY
Susan Miller	SMILLER	Regional Manager, SE
Mark Lemur	MLEMUR	Field Sales Rep, FL
Wayne Takuda	WTAKUDA	Field Sales Rep, GA

## Forecast Line Items



Date	Fest	Cmt	Account	Opportunity	Description	Revenue	Upside	Downside	Margin	Prob
1/1/99	✓		AK Parker	275 Portables	Services	\$50,000	\$30,000			50%
1/1/99		✓	AK Parker	275 Portables	Hardware	\$65,000		\$40,000	\$30,000	60%
1/1/99	✓		AK Parker	275 Portables	Networks	\$25,000				50%
1/1/99			AK Parker	275 Portables	Services	\$35,000				50%
1/15/99	✓	✓	Acme	Routers + Hub	Networks	\$65,000	\$45,000			60%
3/15/99	✓	✓	Acme	Routers + Hub	Install	\$90,000			\$45,000	75%
1/15/99	✓		Acme	Routers + Hub	Rollout	\$65,000		\$15,000	\$15,000	75%

FIG. 25

FIG. 26

Revenues by Month, then by Account						
Account	Jan	Feb	Mar	Apr	May	Jun
Acme	35,000	40,000	45,000	35,000	25,000	
AK Parker	10,000		25,000			30,000
AG Edwards		25,000		30,000		
Totals	45,000	65,000	70,000	65,000	25,000	30,000

FIG. 26

478

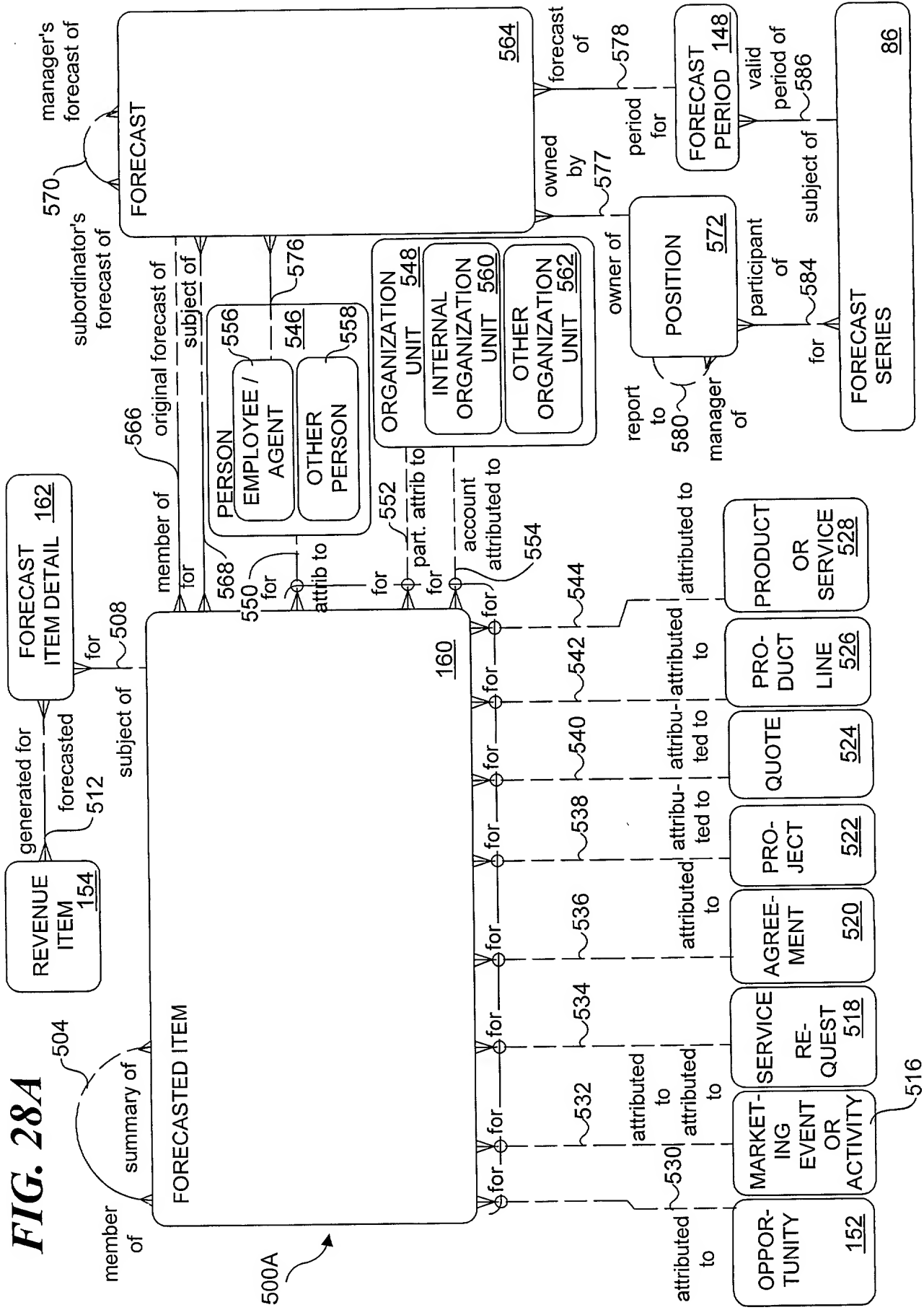
Revenues by Month, then by Account							
Account	Item	Commit	Prob	Sales Rep	Rev Cls	Rev Tp	Jan Feb Mar
Acme	Networks	✓	60%	HALACON	Bookings	Commit	65,000
	Install	✓	50%	HALACON	Bookings	Upside	50,000
	Rollout	✓	50%	HALACON		Expect	65,000
Acme Totals							65,000 115,000
AK Parker	Services	✓	50%	HALACON	Bookings	Commit	50,000
	Hardware		60%	HALACON	Bookings	Commit	65,000
	Networks	✓	60%	HALACON		Upside	25,000
	Services	✓	50%	HALACON	Billings		35,000
AK Parker Totals							75,000 100,000
...							
Grand Totals							230,000 350,000

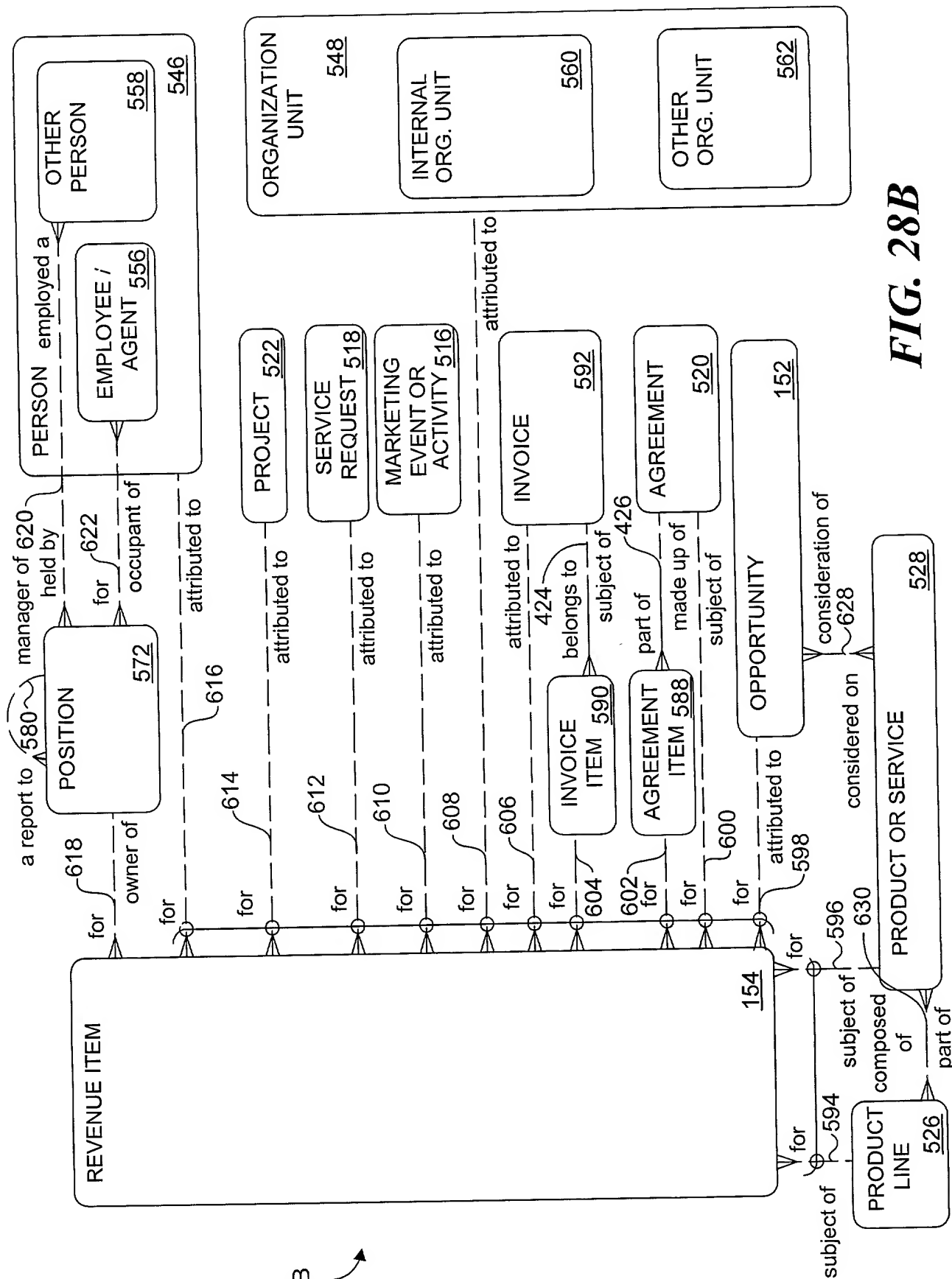
FIG. 27

480

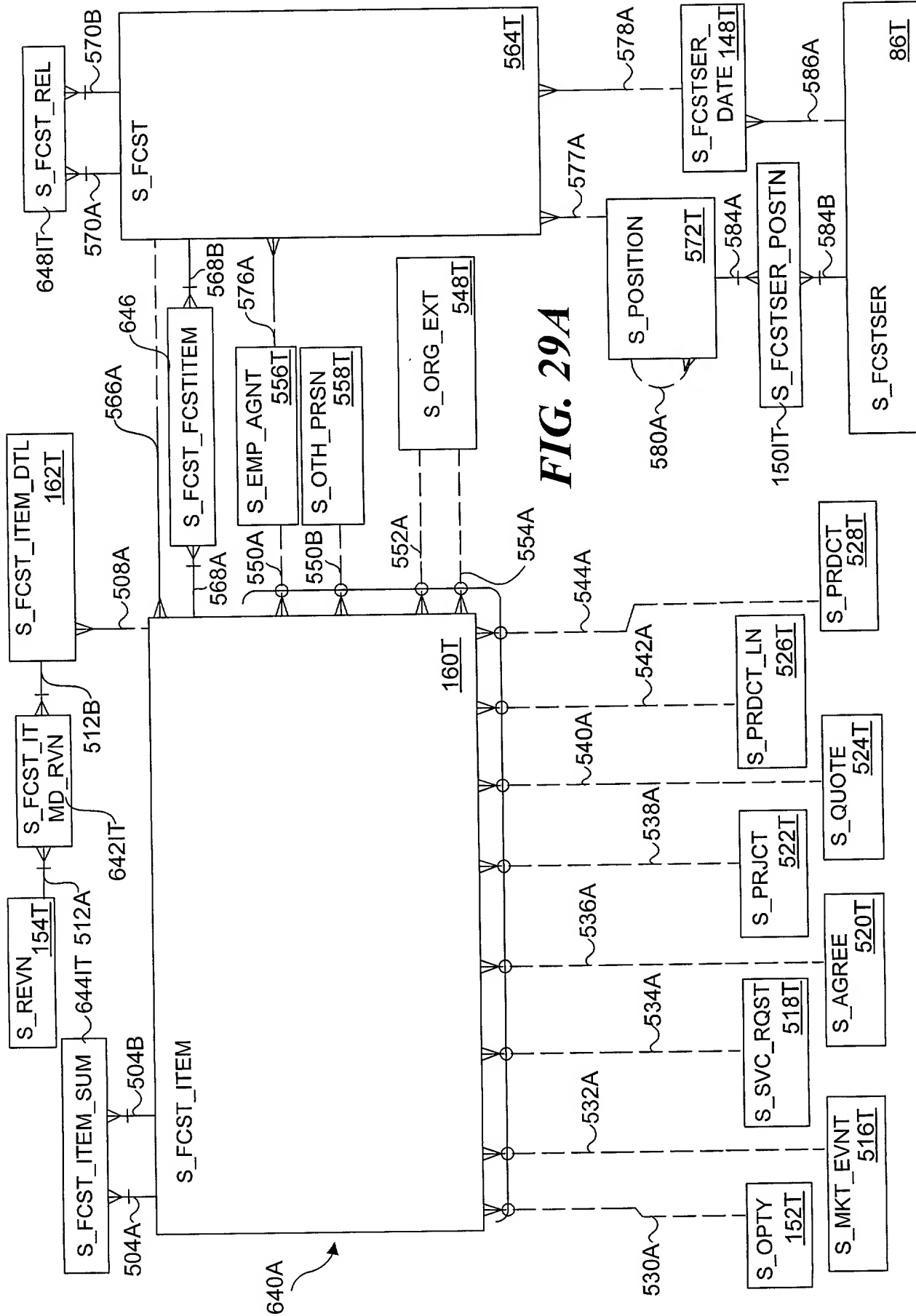


**FIG. 28A**





**FIG. 28B**



**FIG. 29A**

FIG. 29B is a block diagram of a system architecture for a supply chain management system. The system includes a central data processing unit (154T) that is connected to various data sources and processing modules. The data sources include S\_REVN (154T), S\_POSITION (572T), S\_OTR\_PRSN (558T), S\_EMP\_AGNT (556T), S\_PRJCT (522T), S\_SVC\_RQST (518T), S\_MKT\_EVTNT (516T), S\_ORG\_EXT (548T), S\_INVOICE (592T), S\_AGREE (520T), S\_OPTY (152T), S\_PRDCT\_LN (526T), S\_PRDCT\_LN\_REL (528T), S\_PRDCT\_OP\_REL (654IT), S\_PRDCT\_LN\_REL (652IT), S\_PRDCT\_OP\_REL (654IT), S\_PRDCT\_LN\_REL (652IT), S\_PRDCT\_OP\_REL (654IT), and S\_PRDCT\_LN\_REL (652IT). The processing modules include S\_POSITION (572T), S\_OTR\_PRSN (558T), S\_EMP\_AGNT (556T), S\_PRJCT (522T), S\_SVC\_RQST (518T), S\_MKT\_EVTNT (516T), S\_ORG\_EXT (548T), S\_INVOICE (592T), S\_AGREE (520T), S\_OPTY (152T), S\_PRDCT\_LN (526T), S\_PRDCT\_LN\_REL (528T), S\_PRDCT\_OP\_REL (654IT), S\_PRDCT\_LN\_REL (652IT), S\_PRDCT\_OP\_REL (654IT), and S\_PRDCT\_LN\_REL (652IT). The system is connected to a network (640B) and a database (640A). The network (640B) is connected to the central data processing unit (154T) and the database (640A). The database (640A) is connected to the central data processing unit (154T) and the network (640B). The system is also connected to a user interface (640C) and a reporting module (640D). The user interface (640C) is connected to the central data processing unit (154T) and the reporting module (640D). The reporting module (640D) is connected to the central data processing unit (154T) and the user interface (640C).

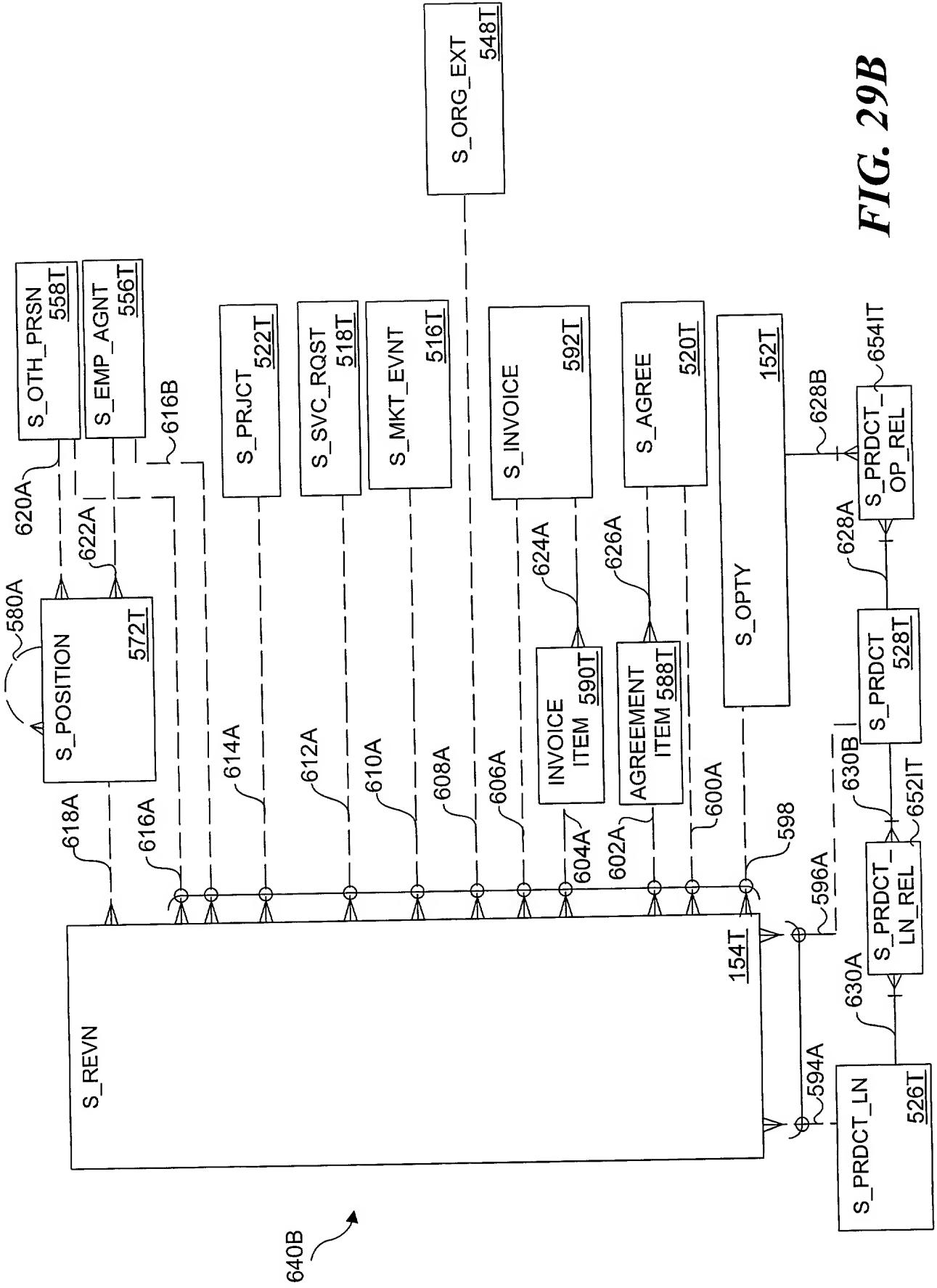


FIG. 29B

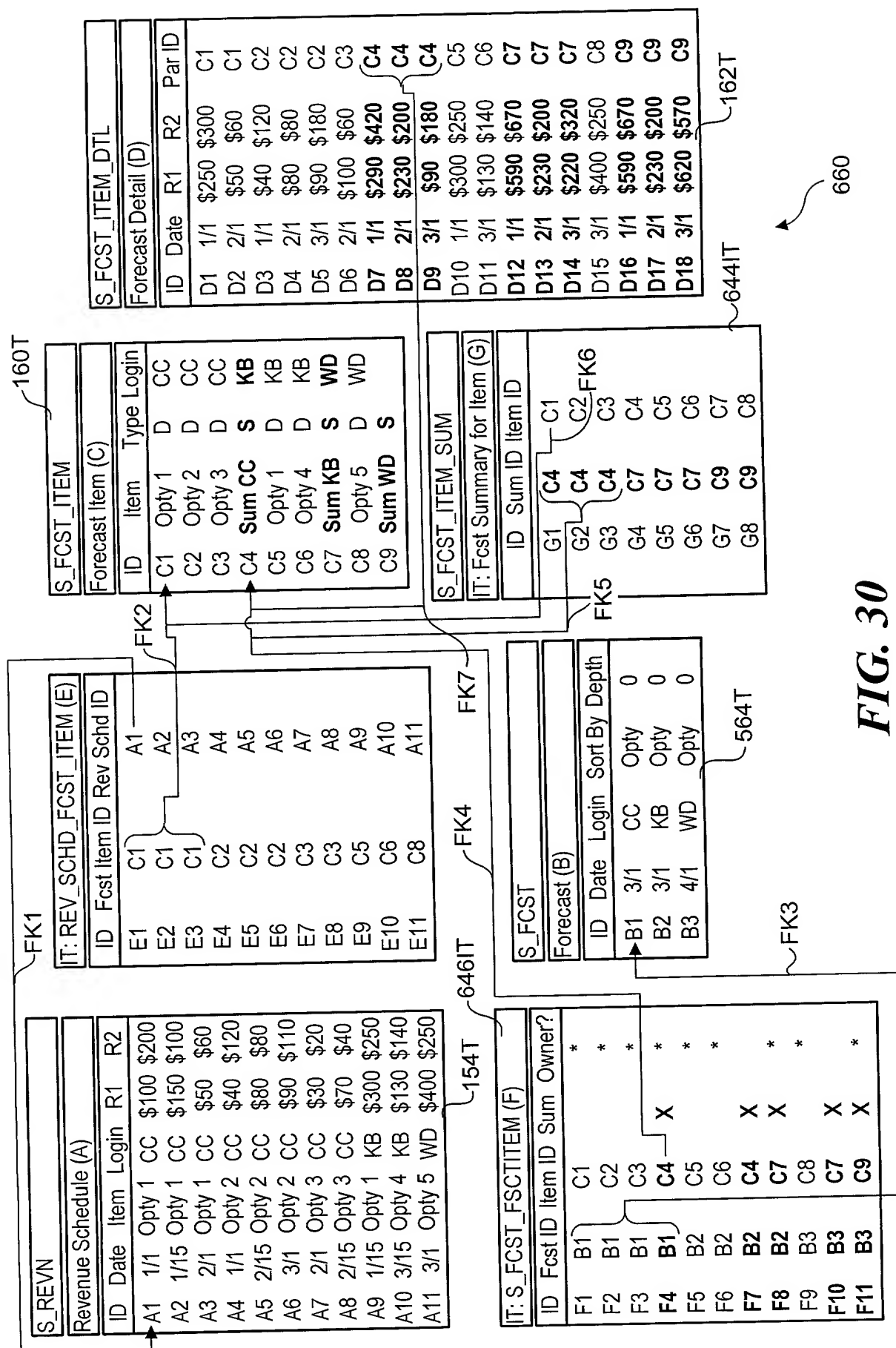
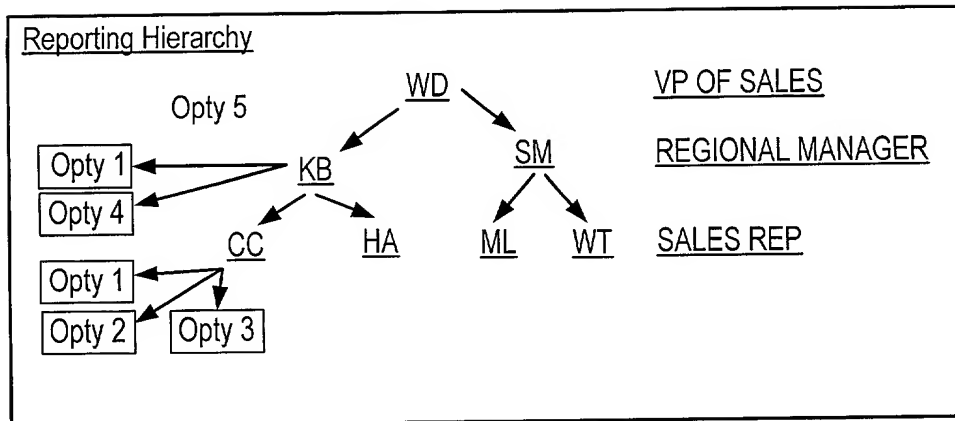
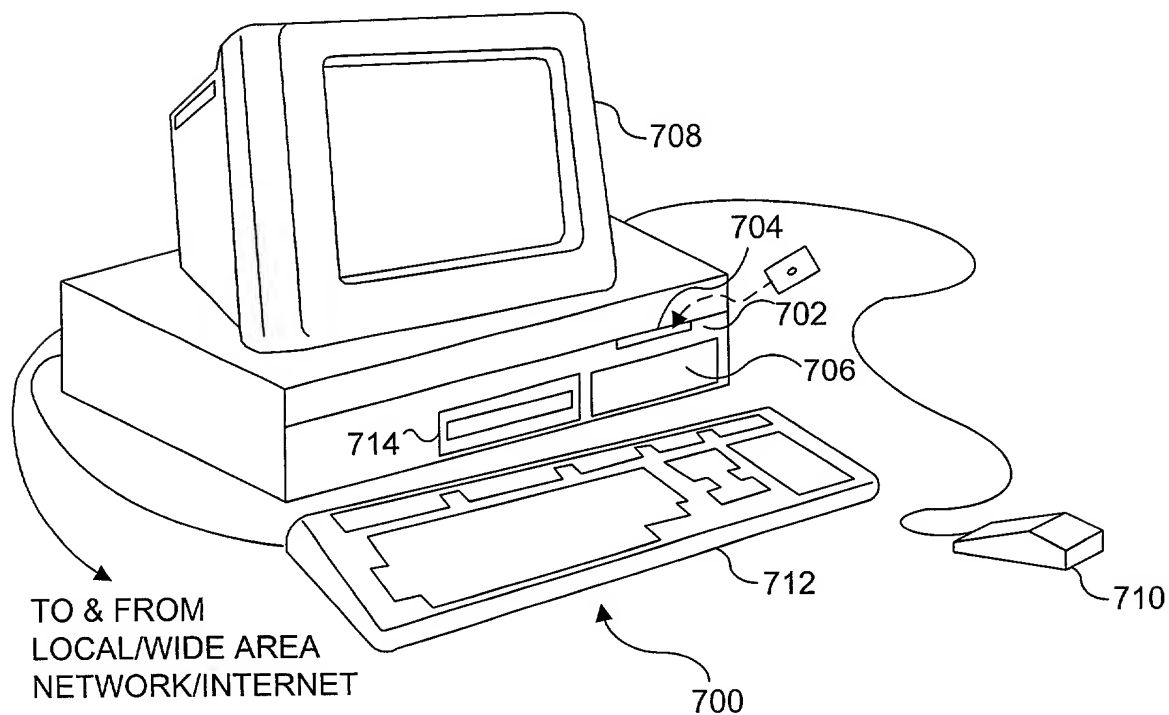


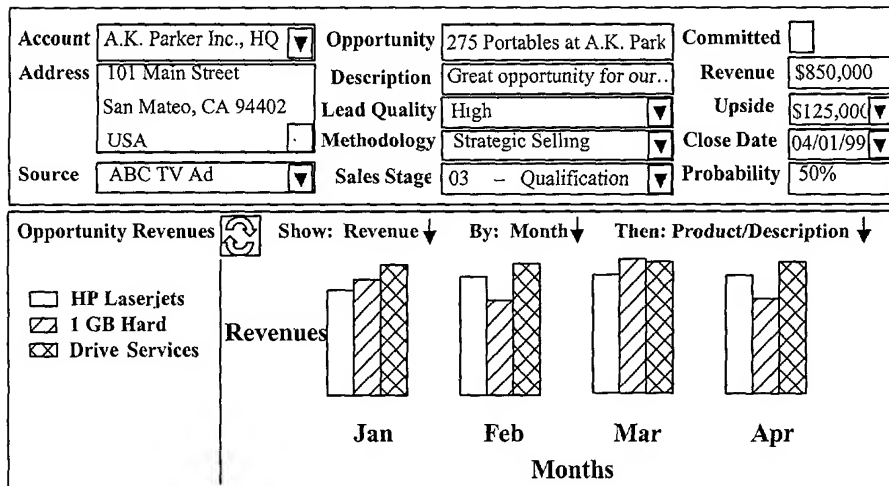
FIG. 30



**FIG. 31**

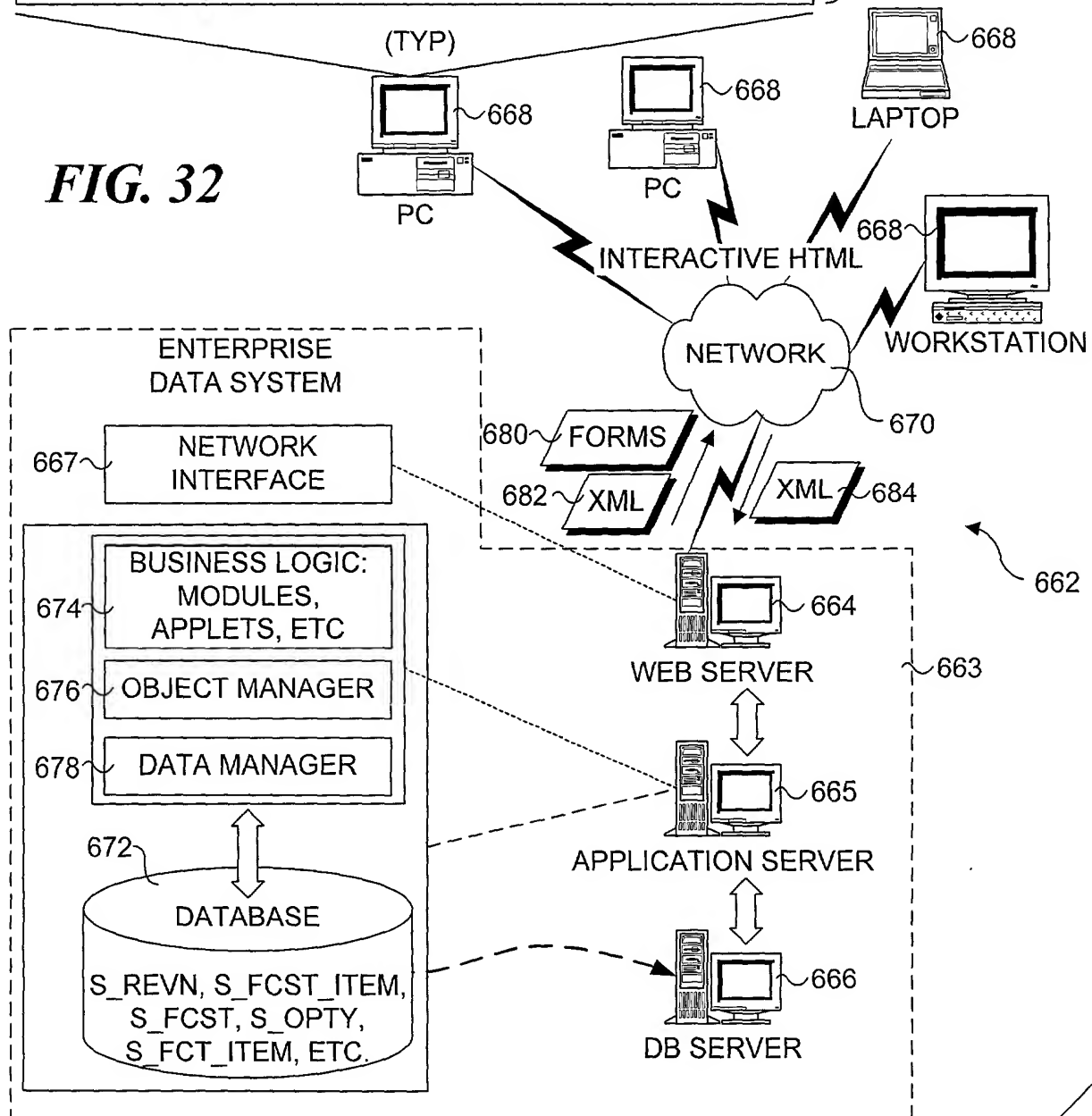


**FIG. 35**



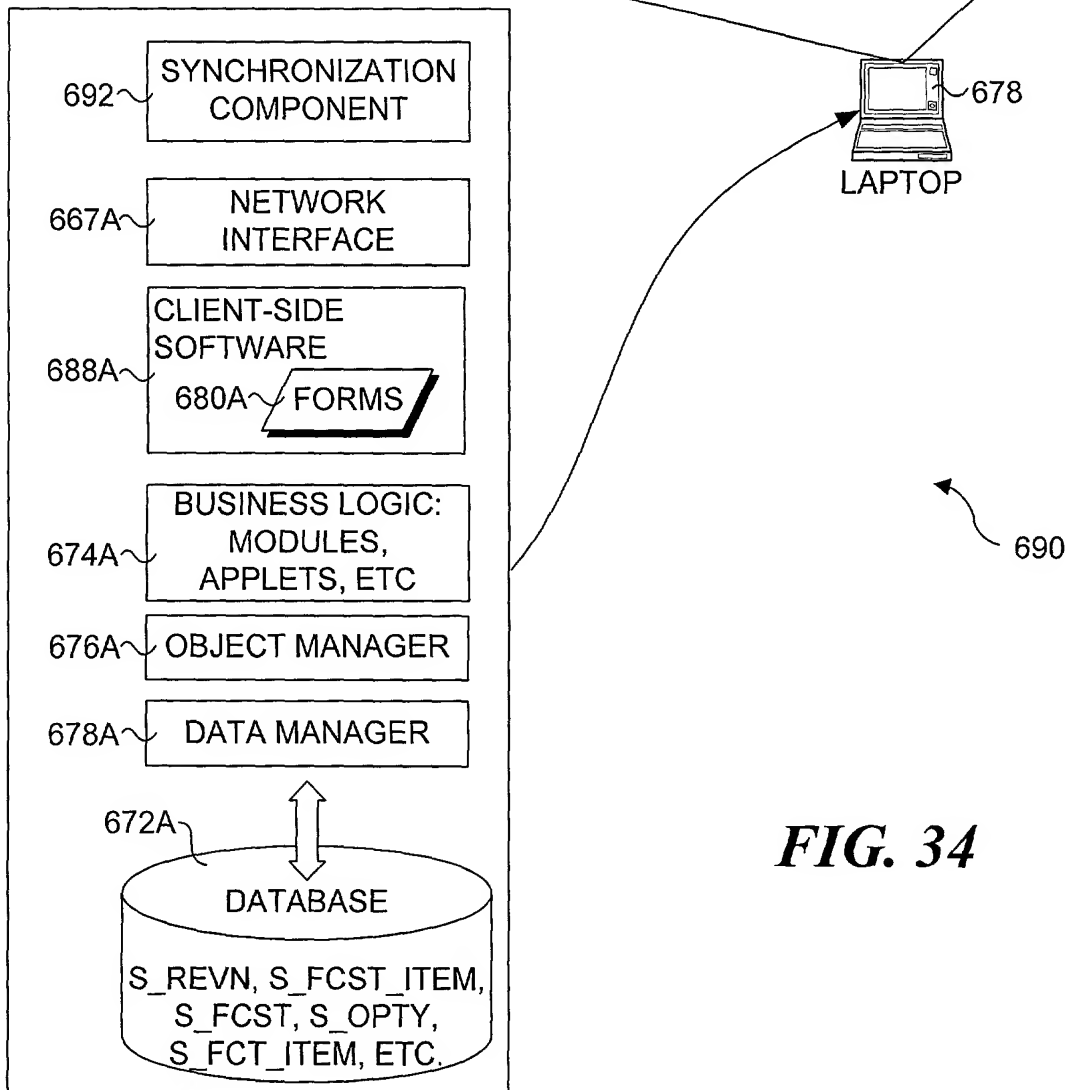
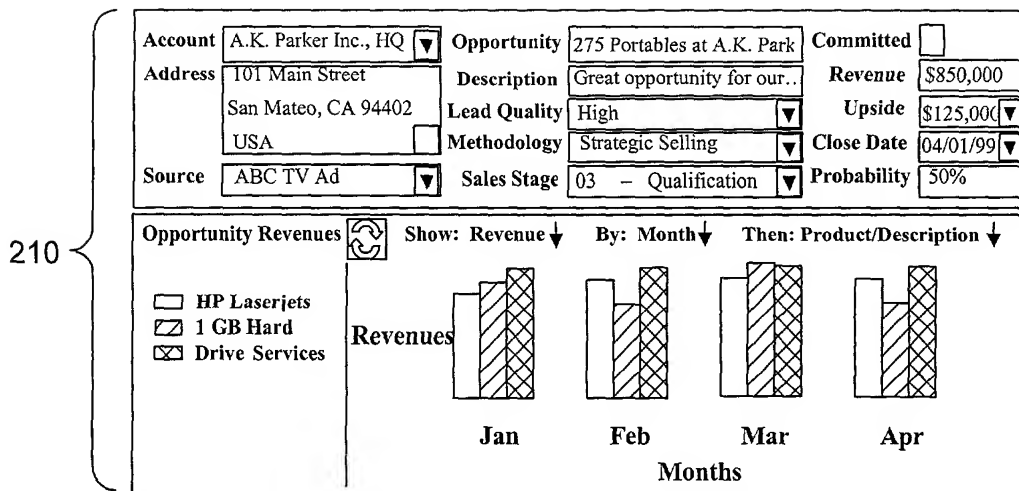
210

FIG. 32









**FIG. 34**